

## **PIMS V. 5.3 ADT Module User Manual**

### **Means Test Supervisor Menu**

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## **Overview**

This menu contains the options used in all aspects of Means Testing. This includes adding, completing, editing, viewing past Means Tests, and referral to Adjudication, if necessary. This menu is locked with the DGMEANSTEST key.

Public Law 101-508 permits the VA to verify income data with the Internal Revenue Service (IRS) and Social Security Administration (SSA) for veterans receiving VA health care services whose eligibility for medical care is based on income. The income verification match (IVM) process for VHA medical facilities is centralized and performed at the IVM Center, Atlanta, GA.

With the installation of the IVM v1.0 software, all Means Tests completed since January 1, 1993 which met the following criteria were transmitted to the IVM Center. Subsequently, any Means Test added or edited is sent via a nightly background job.

- Patient is Category A but was neither adjudicated nor given a hardship exemption.
- Patient is Category C but has no active health insurance on file.

This information provides the IVM Center with the ability to compare the income reported to VHA by the veteran with records maintained by SSA and IRS. The IVM Center then begins verification of the cases. If applicable, the Means Test is updated and the veteran signs the revised 10-10f. The new Means Test is electronically transmitted to the field facility and automatically updated. The original Means Test conducted by the facility will be inactivated and the IVM test will become the Primary (active) test for the test date. Both the original VAMC test and verified IVM test are not editable, but may be viewed and printed.

The automatic filing of the IVM verified Means Test may change the patient's current Means Test status. If the status changes from Category A to Category C and the patient received medical care after the Means Test date, Means Test copayment charges for those episodes of care will automatically be created. These charges must be reviewed before being passed to Accounts Receivable.

## **Overview**

The following is a list of the options contained in this menu and a brief description of their major function.

### **DELETE A MEANS TEST**

This option allows deletion of Means Test data from the ANNUAL MEANS TEST file (#408.31) for specified patient(s). In order to use this option, users must hold the DG MTDELETE security key.

### **MEANS TEST USER MENU**

#### **ADD A NEW MEANS TEST**

This option allows adding a new Means Test for patients who require one.

#### **ADJUDICATE A MEANS TEST**

This option allows entry of final outcome of Means Tests referred to Adjudication.

#### **COMPLETE A REQUIRED MEANS TEST**

This option allows completion of Means Tests for patients in a REQUIRED status.

#### **DOCUMENT COMMENTS ON A MEANS TEST**

This option is used to add/edit/delete free-text comments on a selected Means Test.

#### **EDIT AN EXISTING MEANS TEST**

This option is used to make changes to existing Means Tests. This is the only option which allows changes to completed Means Tests.

#### **HARDSHIPS**

This option allows the user to grant, edit, and delete hardships for the current Means Test.

#### **VIEW A PAST MEANS TEST**

This option allows viewing of past Means Tests.

### **VIEW MEANS TEST EDITING ACTIVITY**

This option provides a method of viewing specific changes made to Means Test data for a selected patient.

## **Delete a Means Test**

The Delete a Means Test option is used to delete individual dates of Means Tests for a specified patient from the ANNUAL MEANS TEST file (#408.31). It can also be used to delete all Means Tests for a non-veteran patient.

Means Tests that have been verified by the Income Verification Match (IVM) Center and the corresponding VAMC test are uneditable and cannot be deleted. If you choose such a Means Test, the system will display a message informing you it cannot be deleted.

Deletion of a patient's most recent Means Test requires a change in Means Test status. The system automatically assigns the status corresponding to the next most recent Means Test and displays a message.

Utilizing this option only deletes the patient's Means Test record entry in the ANNUAL MEANS TEST file (#408.31). All information concerning income, assets, debts, spouse, dependent children, etc. is maintained.

Only users holding the DG MTDELETE security key may access this option.

## **Means Test User Menu**

### **Add a New Means Test**

The Add a New Means Test option is used to enter a new Means Tests into the system. Only one date of test should exist for a patient annually. The following rules apply to adding a Means Test.

- the date of test cannot be before 7/1/86
- the date of test cannot be before the last date of test
- a new date of test cannot be added if one exists in the last 365 days unless it is a new calendar year

The Means Test information is based on the last calendar year and is entered through a series of screens. Based on the financial information entered and the income thresholds established, the system determines the appropriate Means Test category for the patient. If it is necessary to refer the case to adjudication, the system will prompt "Do you wish to send this case to adjudication?". If YES is entered, the veteran will be placed in Category C until determination is returned from adjudication. If NO is entered, the system makes the final determination that the veteran is Category C.

If the veteran's Means Test status is PENDING ADJUDICATION, he/she is tentatively placed in Category C and must agree to pay the deductible. If the veteran does not agree to pay the deductible, a message is printed in the signature block for the deductible on the 10-10F form.

Screen 1 of this option uses the List Manager utility. The List Manager is a tool designed to display a list of items. It allows you to select items from the list and perform specific actions against those items.

**Screen 1 - Marital Status/Dependents** is used to enter data on the veteran's spouse and dependent children. Name, social security number, sex, and date of birth must be entered for the veteran's spouse and dependent children if it has not already been filled in through registration. This information is extremely important as it is critical in determining the annual income thresholds for the veteran.

## **Means Test User Menu**

### **Add a New Means Test**

Spouse and dependent children income collection is dependent on several factors. The spouse's income need only be entered if the spouse lived with the veteran last calendar year or, if they did not live together, the veteran contributed at least \$600 to the spouse's support. Dependent children income is only required if the child had income which was available to the veteran last calendar year. The following is a brief explanation of some of the actions which may be taken.

DD - In order to edit the dependent demographics, the selected dependent has to be active and associated with the Means Test.

DP - Delete Dependent functionality requires that the user hold the DG DEPDELETE security key. This functionality should be mainly used to delete duplicate dependents. In order to delete a dependent, they must be removed from every Means Test (using the RE protocol).

CD - Copy Data can only be used if there is previous year income on file and no income on file for this year.

ED - Expand Dependent will move to another screen (Expand Dependent). It is used to edit the effective date (date the person became a dependent of the veteran).

**Screen 2 - Previous Calendar Year Gross Income** is used to enter income information such as military retirement, total employment income, and social security. Some fields may be filled in from information collected in registration. Depending on the information entered on Screen 1, this screen may appear with one column (veteran), two columns (veteran/spouse), or three columns (veteran/spouse/dependents). The required information will be prompted for each column shown. The item number(s) you select for editing may be preceded by V (veteran), S (spouse), or C (children) to select those specific fields; otherwise, the fields for all three will be displayed.

**Screen 3 - Deductible Expenses** is used to enter any medical, funeral/burial expenses, and children's educational expenses. A child's educational expenses can only be claimed if the child had total employment income.

## **Means Test User Menu**

### **Add a New Means Test**

**Screen 4 - Previous Calendar Year Net Worth** is used to enter such information as stocks and bonds, real property, bank accounts, and debts. Depending on the information entered on Screen 1, this screen may appear with one column (veteran) or two columns (veteran/spouse). The item number(s) you select for editing may be preceded by V (veteran) or S (spouse) to select those specific fields; otherwise, the fields for both will be displayed. The required information will be prompted for each column shown.

When adding a Means Test, completion of the test is optional; however, the marital and dependent children sections must be completed in order to complete the Means Test. For Category A veterans, the net worth must also be entered. If you choose not to complete the Means Test, it may be completed later through either the Complete a Required Means Test or Edit an Existing Means Test options.

You may choose to print the Financial Worksheet (VAF 10-10F) when the Means Test is completed or print the prior Means Test (if one exists) at the beginning of the option.

Access to this option is limited to holders of the DG MEANSTEST security key.

## **Means Test User Menu**

### **Adjudicate a Means Test**

The Adjudicate a Means Test option is used to enter the patient's Means Test category into the system when the determination is returned from Adjudication. Only patients who currently have the Means Test status of PENDING ADJUDICATION may be selected.

A patient's Means Test may be referred to Adjudication for Means Test Category determination when income alone places the veteran in Category A, but income plus net worth (property) is equal to or greater than the allowable threshold.

If a change is made which involves the Category C Means Test status, a bulletin may be generated informing the user and advising review of the Category C charges for the selected patient.

Access to this option is limited to holders of the DG MEANSTEST security key.

## **Means Test User Menu**

### **Complete a Required Means Test**

The Complete a Required Means Test option is used to complete Means Tests generated through registration or by other circumstances. Only Means Test records with a status of REQUIRED may be completed.

The Means Test information is based on the last calendar year and is entered through a series of screens. Based on the financial information entered and the income thresholds established, the system determines the appropriate Means Test category for the patient. If it is necessary to refer the case to adjudication, the system will prompt "Do you wish to send this case to adjudication?". If YES is entered, the veteran will be placed in Category C until determination is returned from adjudication. If NO is entered, the system makes the final determination that the veteran is Category C.

If the veteran's Means Test status is PENDING ADJUDICATION, he/she is tentatively placed in Category C and must agree to pay the deductible. If the veteran does not agree to pay the deductible, a message is printed in the signature block for the deductible on the 10-10F.

Screen 1 of this option uses the List Manager utility. The List Manager is a tool designed to display a list of items. It allows you to select items from the list and perform specific actions against those items.

**Screen 1 - Marital Status/Dependents** is used to enter data on the veteran's spouse and dependent children. Name, social security number, sex, and date of birth must be entered for the veteran's spouse and dependent children if it has not already been filled in through registration. This information is extremely important as it is critical in determining the annual income thresholds for the veteran.

Spouse and dependent children income collection is dependent on several factors. The spouse's income need only be entered if the spouse lived with the veteran during the last calendar year or, if they did not live together, the veteran contributed at least \$600 to the spouse's support. Dependent children income is only required if the child had income which was available to the veteran last calendar year. The following is a brief explanation of some of the actions which may be taken.

## **Means Test User Menu**

### **Complete a Required Means Test**

DD - In order to edit the dependent demographics, the selected dependent has to be active and associated with the Means Test.

DP - Delete Dependent functionality requires that the user hold the DG DEPDELETE security key. This functionality should be mainly used to delete duplicate dependents. In order to delete a dependent, they must be removed from every Means Test (using the RE protocol).

CD - Copy Data can only be used if there is previous year income on file and no income on file for this year.

ED - Expand Dependent will move to another screen (Expand Dependent). It is used to edit the effective date (date the person became a dependent of the veteran).

**Screen 2 - Previous Calendar Year Gross Income** is used to enter income information such as military retirement, total employment income, and social security. Some fields may be filled in from the information collected in registration. Depending on the information entered on Screen 1, this screen may appear with one column (veteran), two columns (veteran/spouse), or three columns (veteran/spouse/dependents). The item number(s) you select for editing may be preceded by V (veteran), S (spouse), or C (children) to select those specific fields; otherwise, the fields for all three will be displayed. The required information will be prompted for each column shown.

**Screen 3 - Deductible Expenses** is used to enter any medical, funeral/burial expenses, and children's educational expenses. A child's educational expenses can only be claimed if the child had total employment income available.

**Screen 4 - Previous Calendar Year Net Worth** is used to enter such information as stocks and bonds, real property, bank accounts, and debts. Depending on the information entered on Screen 1, this screen may appear with one column (veteran) or two columns (veteran/spouse). The item number(s) you select for editing may be preceded by V (veteran) or S (spouse) to select those specific fields; otherwise, the fields for both will be displayed. The required information will be prompted for each column shown.

Completion of the Means Test through this option is mandatory. The Means Test status will automatically be updated once editing is complete.

You may choose to print the VAF 10-10F, Financial Worksheet, when the Means Test is completed.

## **Means Test User Menu**

### **Document Comments on a Means Test**

The Document Comments on a Means Test option is used to add/edit/delete comments to an existing Means Test. This allows the user to enter any pertinent information concerning the selected Means Test such as efforts made to obtain Means Test information.

You will be prompted for the patient name and the Means Test date. The latest Means Test date will appear as the default. A question mark (?) may be entered to obtain a list of Means Test dates for that patient. Comments may then be added through a word-processing field. Existing comments can be edited or deleted.

## **Means Test User Menu**

### **Edit an Existing Means Test**

The Edit an Existing Means Test option is used to make changes to data in existing Means Tests. It may also be used to complete Means Tests on patients identified through Registration as requiring Means Testing. Only the latest Means Test may be edited. A Means Test that has been verified by the Income Verification Match (IVM) Center and its corresponding original VAMC Means Test are both uneditable. If you choose such a Means Test, the system will display a message containing this information. However, this option will let you view or print such a test.

The Edit an Existing Means Test option operates similarly to the Add a New Means Test and Complete a Required Means Test options; however, it is the only option which allows changes to completed Means Tests. After these changes are entered, the system redetermines the patient's Means Test category and changes it, if necessary. If additional information is needed to make a determination or if it is necessary to refer the case to adjudication, the system prompts accordingly.

The date(s) and name(s) of individual(s) making changes is recorded by the system and may be seen through the View Means Test Editing Activity option.

A Means Test is required under the following conditions.

- primary eligibility is NSC or 0% service-connected non-compensable
- does not receive disability retirement from the military
- is not eligible for Medicaid
- is not on a domiciliary ward
- has not been Means Tested in the past year

Should these criteria change (excluding the last two), a Means Test status of NO LONGER REQUIRED will be assigned to the Means Test. Tests with this status cannot be edited.

Depending on the information entered on Screen 1, Screen 2 may appear with one column - veteran; two columns - veteran/spouse; or three columns - veteran/spouse/dependents. The item number(s) you select for editing may be preceded by V (veteran), S (spouse), or C (children) to select those specific fields; otherwise, the fields for all three will be displayed.

## **Means Test User Menu**

### **Edit an Existing Means Test**

Screen 4 may appear with one or two columns. The item number(s) you select for editing may be preceded by V (veteran) or S (spouse) to select those specific fields; otherwise, the fields for both will be displayed. The required information will be prompted for each column shown.

Screen 1 of this option uses the List Manager utility. The List Manager is a tool designed to display a list of items. It allows you to select items from the list and perform specific actions against those items.

You may print the VAF 10-10F, Financial Worksheet, when the Means Test is complete.

Access to this option is limited to holders of the DG MEANSTEST security key.

## **Means Test User Menu Hardships**

This option replaces the Change a Patient's Means Test Category option. It allows users to grant, edit, and delete hardships for the current Means Test.

Hardship Determinations continue to be the responsibility of the VAMCs; however, they will be sent to the HEC and distributed nationally along with the Primary Means Test to all VAMCs that the veteran has visited. Once granted, a Hardship is in effect until a new Means Test is required. The VAMC that granted the hardship will retain the original Means Test Status when the status changes. For example, if a Hardship determination changes the original status from Category C to Category A, the new status (A) is stored as the Means Test status. The original status (Category C) is then stored as Test Determined Status.

The Hardship Determinations screen provides the following List Manager actions.

### *Grant Hardship*

Allows you to grant hardships for current Means Tests for the selected patient. Prompts for Hardship Effective Date and Hardship Review Date. Once granted, a hardship remains in effect until a new Means Test is required.

### *Edit Hardship*

Allows you to edit hardships for current Means Tests for the selected patient. Prompts for Hardship Effective Date and Hardship Review Date. Only the VAMC that determines the hardship can edit or delete it.

### *Delete Hardship*

Allows you to delete hardships for current Means Tests for the selected patient. Only the VAMC that determines the hardship can edit or delete it. When a hardship is deleted, no record of it is retained in the database.

### *Edit Comments*

Allows you to add, edit, and delete comments related to hardships for current Means Tests for the selected patient.

Access to this option is limited to holders of the DG MEANSTEST security key.

## **Means Test User Menu**

### **View a Past Means Test**

The View a Past Means Test option is used to view past Means Tests data. The option does not allow editing. You will be prompted for the patient's name and the date of the Means Test you wish to view. Double question marks (??) entered at the date prompt will provide you with a list of the patient's Means Test dates from which to choose.

If certain circumstances exist for the selected patient, messages may be displayed. A message will be printed if no detailed income information is on file for the veteran, or if the veteran's Means Test status is NO LONGER REQUIRED. Since income data can be entered/edited through registration, once a Means Test has this status, the income data being viewed may differ from that originally entered as part of the Means Test.

You will be able to view the following four Means Test screens through this option.

- Screen 1 Marital Status/Dependents
- Screen 2 Previous Calendar Year Gross Income
- Screen 3 Deductible Expenses
- Screen 4 Previous Calendar Year Net Worth

The option may display the dependent totals **not** converted. Totals not converted will only be displayed under the following conditions.

- Converted totals exist and Means Test income is 0 or greater
- For a spouse - the veteran is married but detailed income information is not available
- For dependent children - the veteran has dependent children but detailed income information is not available

In other words, the Means Test has not been edited under the new 1010F rules with spouse or dependent children information added.

## **View Means Test Editing Activity**

The View Means Test Editing Activity option provides a method of viewing changes made to Means Test data. If the selected patient has more than one Means Test on file, they will be listed for selection.

The computer keeps track, by patient, each time any change is made to the Means Test data either through Means Test or Registration. The types of changes that are captured are shown below. Both the old and new status value will be shown on the report.

- Add New Means Test
- Adjudicate Means Test
- Means Test Category Change
- Edit Existing Means Test Info
- Means Test Status Change
- Primary Means Test Change

The output generated by this option will include the following information: patient name, Means Test date, date of change, type of change, and the user who made the change. The time will appear along with the date of change if it was part of the original entry.

If no changes have been made to the selected Means Test, the output will state that fact.

You must hold the DG MEANSTEST security key to access this option.